

Claims

WHAT IS CLAIMED IS:

1503 61> 1. A method of implementing a collaborative management
2 application, the method comprising:
3 logging on to the collaborative management application;
4 configuring an appearance of the collaborative management application:
5 and
6 viewing, adding, or modifying items of information pertaining to one or
7 more clients;
8 wherein said configuring further comprises:
9 specifying identifying information for a client;
10 specifying information for at least one matter of the client;
11 selecting a component in connection with all matters of the client;
12
13 specifying at least one category for the component;
14 identifying a user group for the client, the user group comprising
15 a set of users having some level of authorization with respect to matters of the
16 client;
17 wherein said viewing, adding, or modifying further comprises:
18 selecting a client;
19 selecting one or more matters in connection with the selected
20 client, wherein the one or more matters comprise a group of matters;
21 selecting a component in connection with the selected group of
22 matters;
23 selecting a filter for filtering items for the selected client, matters
24 and component;
25 displaying the filtered items to a user;

26 selecting a user;
27 displaying only items for which the selected user has been
28 designated; and
29 wherein said configuring and said viewing, adding, or modifying are
30 performed via an Internet web site.

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2. The method of claim 1 further comprising:

adding an item to a component; and
specifying a status of said added item.

3. The method of claim 2 further comprising changing a status of
said added item.

4. The method of claim 3 wherein said changing a status of said
added item comprises selecting an icon associated with said item status.

5. The method of claim 2 further comprising:
selecting an item status; and
displaying only items having a status corresponding to the selected item
status.

6. The method of claim 1 wherein the component is selected from a
group consisting of a status component, an outside service provider notes
component, a client notes component, a checklist component, and a critical
dates component and wherein only users identified as outside service provider
users can modify outside service provider notes items and only users identified
as client users can modify client notes items.

1 7. The method of claim 1 wherein said configuring further
2 comprises assigning an authorization level to each user of the user group.

1 8. The method of claim 7 wherein said configuring further
2 comprises modifying the authorization level of a user of the user group in
3 connection with at least one matter of the client.

1 9. The method of claim 1 wherein the Internet web site is
2 maintained by a party selected from the group consisting of the client and an
3 outside service provider of the client.

1 10. The method of claim 1 wherein the filter corresponds to a time
2 period and wherein the filtered items comprise items edited during the time
3 period corresponding to the filter.

1 11. The method of claim 10 wherein the filtered items comprise all
2 items added to the component since the items were last viewed.

1 12. The method of claim 2 wherein the item status is selected from a
2 group consisting of hot issue, in progress, and done.

1 13. The method of claim 1 further comprising:
2 adding an item to a component.
3 designating a user in connection with the added item; and
4 responsive to said designating, automatically generating an E-mail to
5 the designated user in connection with the item to provide the designated user
6 with information in connection with the added item.

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1 14. The method of claim 1 further comprising:
2 responsive to user selection of an E-mail icon associated with one of the
3 displayed items, displaying at least one E-mail group for the selected client, the
4 at least one E-mail group comprising a list of users for receiving E-mail
5 messages regarding the selected client and from which the user can select
6 users to receive an E-mail message in connection with the associated item; and
7 sending the E-mail message to the selected users.
8 wherein the collaborative management application automatically filling
9 in a subject field of the E-mail message with a description of the associated
10 item.

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